



E-GRANTS USER GUIDE

CREATING AMENDMENTS TO APPROVED APPLICATIONS



Montana
Office of Public Instruction
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Updated November 2010



CREATING AMENDMENTS TO APPROVED APPLICATIONS

When districts need to make modifications to a "Final Approved" application in E-Grants, an amendment must be created. Some common changes that require an amendment to an E-Grants application are:

- Budgeting carryover funds added to the district's budget;
- Transferring the allocation of funds between eligible programs;
- Re-budgeting object of expenditure or purpose category codes on the budget detail page of an approved application;
- Budgeting reallocated funds added to the district's budget; and
- Program objective or activity changes.

Important Information about Carryover: When a prior year final expenditure report for a carryover-eligible program has been approved, E-Grants automatically brings eligible unexpended funds forward to the districts' current year budget as carryover and generates an automatic e-mail to the district AR and persons who have been entered on the respective application's **Contact Information** page. This is the district's notice that there may be carryover funds to include in the current-year budget. If the prior year final expenditure report is approved *after* the creation of the current year application, an E-Grants amendment to the current year budget is necessary.



Note for Consolidated Applications (ESEA/NCLB and IDEA): All carryover funds stay with the prime applicant/administrative agent. The prime applicant/administrative agent is responsible for submitting amendments; member districts do not take any action.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* on the appropriate grant from the **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* the radio button of the most recently approved application or amendment.
5. *Click* the **CREATE AMENDMENT** button.
6. *Select* **Page Lock Control** (furthest right tab on the tab strip).
7. *Click the* "Expand All" check box.



8. Click the check box to the right of the page(s) needing modification.
 - “Open Page for Editing” unlocks the Web pages that need modification (i.e., Budget Detail, Program Detail, Private/Nonpublic Equitable Share, Targeting Step 4, etc.).
 - *Save the page.*
9. **ESEA/NCLB and IDEA only:** Use the drop-down menu titled “Application Sections” in the upper-right corner of the page to select the appropriate program for modification.
10. Click on the tab (page) to be modified (i.e., Budget Detail, Program Detail, Private/Nonpublic Equitable Share, etc.).
 - Make the necessary changes.
 - *Save the page!!*



Note to ESEA/NCLB and IDEA applicants: If the modification increases or decreases an allocation for a program, the district will need to *re-save* the Private/Nonpublic Equitable Share page under the selected program's Budget Pages tab.

11. Return to the **ESEA/NCLB Consolidated** level of the application from the drop-down list in the upper-right corner.
12. Click the **Amendment Description** tab.
 - If the page is locked, unlock it on the **Page Lock Control** page.
13. Click the check box of the application section(s) where the district made changes on the amendment.
 - Single programs such as Gifted and Talented, Migrant, and Carl Perkins do not have check boxes.
 - Enter a short description of all the changes in the text box.
 - *Save the page!!*
14. Click the **Submit** tab.
 - The **Submit** tab is on the consolidated level of the ESEA/NCLB and IDEA applications.
 - Run the consistency check.
 - Correct any errors that display.
 - If the consistency check identifies changes on pages that have not been unlocked, go to the **Page Lock Control** page and unlock them.



When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

15. (AR only) Click the **SUBMIT TO THE OPI** button to *submit* the application.



Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the amendment has been submitted, the **Application Select** page status will be "Submitted to SEA."

ADDITIONAL INFORMATION

Funding/Allocations Tab (Page)

The carryover amount will be in the "Carryover" row under "Prior Year Funds."

REAP-flex (100% transferability) districts may transfer up to 100% of the carryover funds into receiving programs.

Districts with Schoolwide programs that transferred funds to the Schoolwide budget in the original application:

- Go to Title IA Basic, **Targeting Step 4** page and redistribute the allocation.
- Click each blue button on the **Targeting Step 4** page in the order in which they appear to accurately redistribute funds.
- Return to the **Funding/Allocations** page.
- Enter the amount to transfer into the schoolwide row.

Budget Detail Tab (Page)

The "Allocation Remaining" figure at the bottom of the **Budget Detail** page will display the carryover or reallocated funds to be budgeted for that program.

- Distribute funds under the appropriate object codes and purpose categories.
- Districts have the option to budget up to the "Maximum Indirect Cost" (Line E). If desired, enter the Indirect Cost amount in Line G.